Making A Statement –
Clinical Trials Billing in Epic and SAP

Scott A. Streibich, MBA, MHS, CHRC, CBE
Director, Research Compliance Operations

Special credit to Liza Rodriguez, Associate Director – Clinical Research Billing Compliance
Research Statement Account Charges as of 02/06/20
Guarantor Number: 450000XXXX
Page 1 of 2

Guarantor Number: 450000XXXX
Guarantor Name: A Phase I Study of the Pharmacokinetics and Pharmacodynamics of
Guarantor Address: Scott Streibich/streib1@jhmi.edu/Study ID# 9004XXXX,
Baltimore, MD 21287 CRMS Number: CRMS-7XXXX
IRB Number: IRB0009XXXX

For more information: Please contact the Business
Office at ROM-CR@jhmi.edu. Itemized summaries of
previous statements will be provided upon request.

<table>
<thead>
<tr>
<th>Account #</th>
<th>Date</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>500618XXXX - A Phase I Study of the Pharmacokinetics and Pharmacodynamics</td>
<td>01/01/20-01/31/20</td>
<td>$160.44</td>
</tr>
</tbody>
</table>

Total New Charges $160.44

<table>
<thead>
<tr>
<th>Account #</th>
<th>Date</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1518XXXX - Doe, John</td>
<td>10/19/19</td>
<td>$119.30</td>
</tr>
</tbody>
</table>

Total New Charges $119.30

HB Charge Detail

<table>
<thead>
<tr>
<th>Procedure</th>
<th>CPT(R) Code</th>
<th>Svc Dt</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hospital Services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service #: 500618XXXX</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outpatient</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Johns Hopkins Hospital</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>


CRBC Review Criteria

Study Has PRA

Notification Only
Standard
Retrospective

Participant in CRMS

Must be in CRMS prior to the close of the Epic encounter or none of the review process function properly

Active CRMS Status on DOS

Candidate
Consented
Eligible
Enrolled
Follow-Up
Epic Research Indicator
What Does Research Linking Looks Like in Epic?

<table>
<thead>
<tr>
<th>When</th>
<th>Type</th>
<th>Department</th>
<th>With</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/27/15</td>
<td>Office Visit</td>
<td>BV301 CPIM</td>
<td>Internal Med - Christmas</td>
<td>Sick (Primary Dx), Breast mass in female</td>
</tr>
<tr>
<td>07/30/15</td>
<td>BMC VAS DUP AORTA</td>
<td>BMC VASLAB</td>
<td>Vasc Surg - Wooster, L</td>
<td></td>
</tr>
<tr>
<td>07/30/15</td>
<td>Transcribe Orders</td>
<td>BMC CIVIL</td>
<td>Cardiology - Wooster, L</td>
<td></td>
</tr>
<tr>
<td>07/29/15</td>
<td>Anesthesia Event</td>
<td>BMC PERIOP</td>
<td>Surgery - Fallon, S</td>
<td>APPENDECTOMY LAPAROSCOPIC (N/A)</td>
</tr>
<tr>
<td>07/29/15</td>
<td>Surgery</td>
<td>BVMMOR</td>
<td>General Surgery - Ratch...</td>
<td>APPENDECTOMY LAPAROSCOPIC</td>
</tr>
<tr>
<td>07/29/15</td>
<td>BMC VAS DUP AORTA</td>
<td>BVBM VASLAB</td>
<td>Vasc Surg - Wooster, L</td>
<td></td>
</tr>
<tr>
<td>07/21/15</td>
<td>Orders Only</td>
<td>BV301 CPIM</td>
<td>Internal Med - Agee, H</td>
<td>Alice in Wonderland syndrome (Primary Dx)</td>
</tr>
<tr>
<td>06/22/15</td>
<td>Admission (Discharged)</td>
<td>BMC BWU</td>
<td>Wooster, L</td>
<td>Alice in Wonderland syndrome (Primary Dx)</td>
</tr>
</tbody>
</table>

09/29/2015
## Charge Review

### Research Billing Review for Jerry, Benjamin N [JH67534570]

- **Study code:** CRMS-0000001
- **Status:** Enrolled
- **NCT:**
- **IRB:**

#### Study Code: CRMS-0000001

**Study Name:**

**Start Date:** 05/24/17

**End Date:**

**Coordinators:**

#### Charges

<table>
<thead>
<tr>
<th>Rw</th>
<th>Svc Date</th>
<th>Post Date</th>
<th>Code</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>05/24/17</td>
<td>80047 (CPT®)</td>
<td>CHO BASIC METABOLIC PANEL CALCIUM IOP</td>
<td>22.00</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>05/24/17</td>
<td>80061 (CPT®)</td>
<td>CHO LIPID PANEL (aka CHOLESTEROL)</td>
<td>8.00</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>05/24/17</td>
<td>82956 (CPT®)</td>
<td>CHO GLUCOSE TEST (aka GLUCOSE)</td>
<td>8.00</td>
<td></td>
</tr>
</tbody>
</table>

#### Encounters

- **Study-Related - Bill to Insurance/Patient**
JHM Research Charge Workflows

Existing Global Review

- **Encounter Linked by Scheduler?**
  - **Yes** → **Coordinator Reviews & Links Using Report?**
    - **Yes** → **Patient Encounter**
    - **No** → **Encounter Linked by Nurse or Physician?**
      - **Yes** → **Adjudication Subject to PRA**
      - **No**

- **Encounter Linked by Nurse or Physician?**
  - **Yes** → **Adjudication Subject to PRA**
  - **No**

- **Adjudication Subject to PRA**
  - **Yes** → **Bill Only Study Paid Charges to RSH Account**
  - **No** → **Bill to Medicare Coverage**
    - **Yes** → **Medicare Coverage? Add Billing Codes**
    - **No** → **Bill to Default Coverage**
The Epic RSH Record – General Info
The Epic RSH Record – Report Groupers
RSH Account Charges

CPT Category

Charges to RSH Accounts by CPT Category

Facility

Charges to RSH Accounts by Facility

- JHH: $1,983,304
- SMH: $692,497
- JH BMC: $344,394
- SH: $7,287
- HCGH: $832
- Total: $3,028,314
How Research Fee Schedules Function

Physician Services (Epic PB)

► Fees based on 150% of Medicare
► “Pre-discounted”
  ► 150% of Medicare fee is a substantial reduction from department “base” fee
► No additional discounts taken on statement
► “Everyday Low Pricing”

Hospital Services (Epic HB)

► Fees based on 100% (Govt/NFP) and 150% (Pharma/FP) of Medicare equivalent
► Maryland HSCRC determinates rates
  ► Fluctuate often
  ► Rates cannot be frozen in Epic
  ► Discount using memo
► “Everything XX% Off”
2020 Hospital Services Research Discount Rate

2019 (prior to April 2020)
- Government & Not for Profit Award Sponsors
  - 35.7% (64.3% Discount)

- Pharmaceutical & Industry Contract Sponsors
  - 53.6% (46.4% Discount)

- Effective March 1, 2019

NEW 2020 Effective April 1, 2020
- Government & Not for Profit Award Sponsors
  - 28.9% (71.1% Discount)

- Pharmaceutical & Industry Contract Sponsors
  - 43.2% (56.8% Discount)
Direct Study Billing

Existing Research Study “Direct Billing” Workflow

Workflow Period From Email to Study Team to Journal Voucher Preparation/Transmittal is 30 Days

- Monthly Statement Generated
- Statement Sent via PDF/Email to Study Team
- Corrected Statement Generated & Sent to Study Team
- Journal Voucher Prepared for RSH IDA Payment
- Statement Balance Settled

- Charges allocated to Study RSH Account
- CRCM Manager Reviews Contained Info(s)
- CRCM Manager Makes Correction(s)
- CRCM Manager Enters Study Team of Compliance Decision
- Corrected Account Put into Corrected WO 144, or WO 73443

- Study Team Reviews Statement for Errors
- Error Correction Requested?
- If Missing Study Team Provides RSH Account IDA
What if I Don’t Agree?

► Contact the sender of your statement.
  ► Hospital Billing
    ● RCM-R@jhmi.edu
  ► Physician Billing
    ● PBSResearch@jhmi.edu

► The account in question will be added to an Epic work queue.
  ► Please note the CRBC Manager will review the account.
  ► Disputed finding can be appealed to the Associate Director, CRBC, however their decision is final for all JHM research billing matters.
Participant’s Complaints

- If you get a participant complaint, please forward to CLINIRESBILLING@exchange.johnshopkins.edu

- If the participant calls customer service, the complaint will be reviewed by CRBC
Contact Information

Scott Streibich
Director, Research Compliance Operations
410.361.8381
sstreib1@jhmi.edu
https://www.hopkinsmedicine.org/research/resources/offices-policies/CRBC/resources.html

Elizabeth (Liza) Rodriguez
Associate Director, CRBC
410.361.8380
erodri13@jhmi.edu
CLINIRESBILLING@exchange.johnshopkins.edu